APPENDIX II-A
(TG 5-13)

H. O. #2

## WHAT IS MY TELEPHONE I.Q.? *

For each of the following items place a check in the column which applies:

| | Always | Usually | Rarely or Never |
|---|---|---|---|
| 1. I answer telephone calls promptly (at the end of the first ring, if possible). | | | |
| 2. I have a pad and pencil ready for making notes. | | | |
| 3. I use identifying phrases at the beginning of all calls, incoming and outgoing, giving my name and, as appropriate, my office. | | | |
| 4. I speak directly into the telephone mouthpiece, not over nor under it. | | | |
| 5. I speak clearly and naturally, without mumbling or shouting. | | | |
| 6. I end calls courteously and with a definite indication that the conversation is finished. | | | |
| 7. I hang up the telephone gently. | | | |
| 8. When it is necessary to leave the line, I give the caller a choice of waiting or being called back. | | | |
| 9. After leaving the line, I come back and explain waits if it takes longer than expected. | | | |
| 10. I avoid transferring calls whenever possible. However, if I must transfer a call, I transfer it to the person who I know can satisfy the caller. | | | |
| 11. Before transferring a call I give complete information to the caller. | | | |
| 12. I plan conversations in advance, keeping them brief and business like without sacrificing friendliness and courtesy. | | | |
| 13. After dialing I allow time to answer. (About ten rings or a full minute.) | | | |
| 14. I apologize when getting a wrong number. | | | |
| 15. When placing a call I am ready to talk when the person called answers. | | | |
| 16. If my conversation is likely to be lengthy, I ask if it is convenient to talk. | | | |
| 17. I keep and use an up-to-date list of frequently called numbers. | | | |

* This quiz is adapted by permission from one prepared by the Chesapeake and Potomac Telephone Company.

| | Always | Usually | Rarely or Never |
|---|---|---|---|
| 18. I return promptly all calls received in my absence. --- | | | |
| 19. The tone of my voice reflects a reasonably pleasing personality.---------- | | | |
| 20. I try to remedy the lack of face-to-face contact by generous use of phrases such as "Thank you", "Please", "Would you mind?", "I'll be glad to." --- | | | |
| 21. I use the names of the persons with whom I speak. --- | | | |
| 22. I avoid trite expressions which might make my speech sound mechanical and stereotyped.---------- | | | |
| 23. I supply information willingly and don't force callers to pry it out of me.---------- | | | |
| 24. When I return to the line, I first attract the attention of the other person by some introductory remark, such as, "I have that information now." ------- | | | |
| 25. I keep in mind that to the caller my voice may be the VA.---------- | | | |
| TOTAL --------- | | | |

To find your Telephone I.Q.

1. Total the number of checks in the "Rarely or Never" column and multiply by 4.
2. Total the number of checks in the "Usually" column and multiply by 2.
3. Add the two sums.
4. Deduct that figure from 100. This is your I.Q.

**MY TELEPHONE I.Q., IS:** _____

A score of 80 would indicate reasonably good telephone service on your part - but continue to strive for 100 as an objective.

## DEMONSTRATIONS FOR MEETING THE PUBLIC BY TELEPHONE

### INSTRUCTIONS

Two people are needed for these demonstrations - Miss Russell, a secretary, and Mr. Green, a caller. It is preferable that the persons chosen for the demonstrations not be members of the training group. The following equipment is needed: 2 dummy telephones, a small bell. After each demonstration pause for analysis as described elsewhere in this training guide.

Demonstration No. 1

Mr. Green: (Dials number and rings twice.)

Miss Russell: (Is working as the phone rings. Puts pencil aside at first ring and answers phone during the second ring.)

Miss Russell: Records Division, Miss Russell.

Mr. Green: May I speak with Mr. Young?

Miss Russell: May I tell him who is calling?

Mr. Green: This is Mr. Green.

Miss Russell: Just a moment, Mr. Green.

Demonstration No. 2

Mr. Green: (Dials number and rings twice.)

Miss Russell: (Is working as the phone rings. Puts pencil aside at first ring and answers phone during the second ring.)

Miss Russell: Records Division, Miss Russell.

Mr. Green: May I speak with Mr. Young?

Miss Russell: Mr. Young is out of the building and will be back at 10 o'clock. May I ask him to call you then . . . or perhaps I could help you.

Mr. Green: Perhaps you can. My name is Green and I would like to know if you have any records on the old Laredo building and how long would it take to get copies made.

Miss Russell: Yes, Mr. Green, we have some records, but it will take about half a minute to figure out how long it would take to get copies made. Would you like to wait or would you prefer to have me call you back?

Mr. Green: I'd like to wait, please.

Miss Russell: Surely, will you excuse me a moment please? (She pauses a second and lays the receiver down gently. Then she takes pad and pencil at her right hand, opens a book on her desk, and starts to calculate. After half a minute she picks up the receiver.)

Mr. Green, this will take a little bit longer than I expected--about another half a minute. Would you like to wait?

Mr. Green: Yes, I would.

Demonstration No. 2 (continued)

Miss Russell: All right sir. (Completes calculations and picks up the receiver.) Thank you for waiting, Mr. Green. It will take two weeks to prepare the records you want. Would you like that done?

Mr. Green: No. For the moment I wanted to know the time involved. Thank you very much for your help. Goodbye.

Miss Russell: You're welcome. Goodbye. (Hangs up receiver gently.)

Demonstration No. 3

Mr. Green: (Dials number and rings twice.)

Miss Russell: (Is working as the phone rings. Puts pencil aside at first ring and answers phone during the second ring.)

Miss Russell: Records Division, Miss Russell.

Mr. Green: May I speak with Mr. Young?

Miss Russell: Mr. Young is in a meeting right now. I expect him back in an hour. May I ask him to call you then . . . or perhaps I could help you.

Mr. Green: This is something that requires my speaking to Mr. Young. Would you ask him to call me?

Miss Russell: I'd be glad to, sir. (Takes up pencil and pad of SF 63.) May I have your name?

Mr. Green: Green, and I'm on extension 2062.

Miss Russell: That's Mr. Green on extension 2062. Did you want me to give him any particular message, Mr. Green?

Mr. Green: I don't believe so. Thank you. Goodbye.

Miss Russell: You're welcome. Goodbye. (Hangs up receiver gently.)

Demonstration No. 4

Miss Russell: (Starts to dial a number. She pauses a moment reflectively, then looks up a number in a telephone directory. She dials the number and rings five times.)

Mr. Green: (After five rings comes to the table and lifts receiver.) Hello.

Miss Russell: Good morning. This is Miss Russell. I'm calling for Mr. Young, Chief of the Records Division at the Historical Office. May I speak to Mr. Green?

Mr. Green: This is Mr. Green.

Miss Russell: Mr. Green, Mr. Young asked me to check with you to make sure that the meeting in your office at two o'clock tomorrow is still satisfactory.

Mr. Green: Yes, that's still satisfactory.

Miss Russell: Thank you very much. Goodbye.

Mr. Green: Goodbye.

Demonstration No. 5

Miss Russell: (Returns to her desk, picks up and reads an SF 63, and dials a number.)

Mr. Green: (Answers phone during second ring.) Hello.

Miss Russell: Good morning. This is Miss Russell returning Mr. Marshall's call. Is Mr. Marshall in?

Mr. Green: He isn't here. This is Mr. Green from another office. I don't know whether I can help you.

Miss Russell: Would you be kind enough to take a message, Mr. Green? Mr. Marshall wanted to know if he could visit Mr. Young at the Historical Office at 2 o'clock tomorrow. Would you tell him that this will be satisfactory.

Mr. Green: (As he writes.) Mr. Young will see him at 2 o'clock tomorrow at the Historical Office.

Miss Russell: That's right. Mr. Young's Room Number is 110. In case Mr. Marshall wants to call back at any time, the number is Suburbia 3-5162, extension 342.

Mr. Green: (As he writes.) Room 110. Suburbia 3-5162, extension 342.

Miss Russell: That's correct. Thank you very much, Mr. Green. Goodbye.

Mr. Green: Goodbye.

## TELEPHONE TIPS

I. Creating a Favorable Voice Impression.

1. Position the phone correctly.
2. Speak clearly and naturally.
3. Try to develop a friendly and pleasant voice.
4. Don't overdo the friendly voice.

II. Telephone Courtesy.

1. Ask questions tactfully.
2. Choose the right words.
3. Try to be helpful.
   a. Volunteer your help.
   b. Offer to take a message.
   c. Transfer calls only to persons who you know can satisfy the caller.
4. End calls courteously and with a definite indication that the conversation is finished.

III. Two-Way Rules. (The following rules apply whether you are receiving or making a telephone call.)

1. Greet the other person pleasantly.
2. Identify yourself and, as appropriate, your office.
3. Give full attention to the telephone conversation.
4. Use names.
5. Give information willingly.
6. Avoid trite expressions.
7. Take or leave messages willingly.
8. Keep your conversation brief and business like.
9. Hang up the phone gently.

IV. Receiving Calls.

1. Answer the phone promptly.
2. Be prepared to render quick service. (Keep pad and pencil near phone.)
3. Volunteer your assistance.

4. When leaving the line, give the caller a choice of waiting or being called back.

5. Explain waits.

6. When coming back on the line, make an introductory remark to get the caller's attention.

V. Making Calls.

1. Be sure of the number you are calling.

2. Allow time to answer.

3. Plan your conversation before calling. Be ready to talk when the person called answers.

4. Apologize for mistakes.

5. Ask if it is convenient to talk, if the call is likely to be lengthy.

6. Avoid the negative approach when asking for information or seeking assistance.

7. Return promptly all calls received in your absence.

**PHONE AS YOU WOULD BE PHONED**